



Proposal Submission Instructions

Boone County

- ❖ Children's Services Funding

City of Columbia

- ❖ Social Services Funding

Heart of Missouri United Way

- ❖ Community Impact Funding

Table of Contents

| | |
|---|----|
| Introduction..... | 2 |
| Section 1: Accessing the System | 2 |
| Section 2: Developing and Submitting Proposals..... | 3 |
| Step 1: Update Organization Profile | 3 |
| Step 2: Create Proposal Cover Sheet..... | 6 |
| Step 3: Create Proposal Forms..... | 10 |
| Step 4: Complete Proposal Forms..... | 13 |
| Step 5: Review Proposal..... | 15 |
| Step 6: Submit Proposal..... | 18 |
| Section 3: Helpful Tips..... | 18 |

Contact Information

For questions or to report technical difficulties, please contact:

| | |
|-------------------------------------|--|
| Boone County | Boone County Community Services 573.886.4298 communityservices@boonecountymo.org www.showmeboone.com/communityservices |
| City of Columbia | Division of Human Services 573.874.7488 HumanServices@CoMo.gov www.como.gov (search: social services funding) |
| Heart of Missouri United Way | 573.443.4523 www.uwheartmo.org |

Introduction

These instructions are intended to assist organizations in submitting proposals to the City of Columbia, Boone County, and Heart of Missouri United Way in the shared funding management system.

Section 1: Accessing the System

To access the system:

1. Copy and paste the following link to their internet web browser (preferably Google Chrome):
<https://ctk.apricot.info/auth>

PLEASE NOTE

Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.

apricot

USERNAME

yourname@email.com

PASSWORD

your password

Log In To Apricot

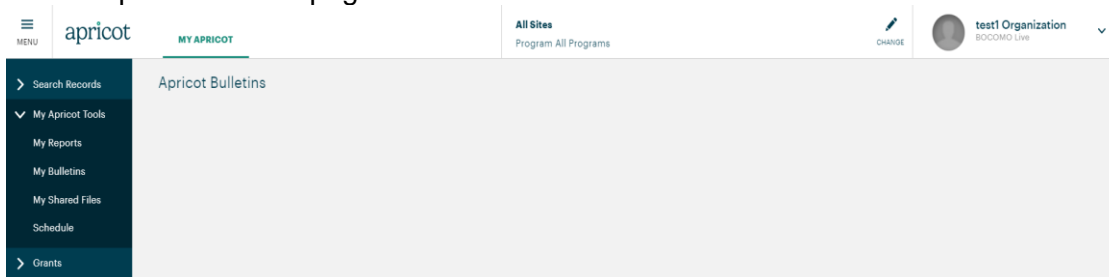
[Forgot Password](#)



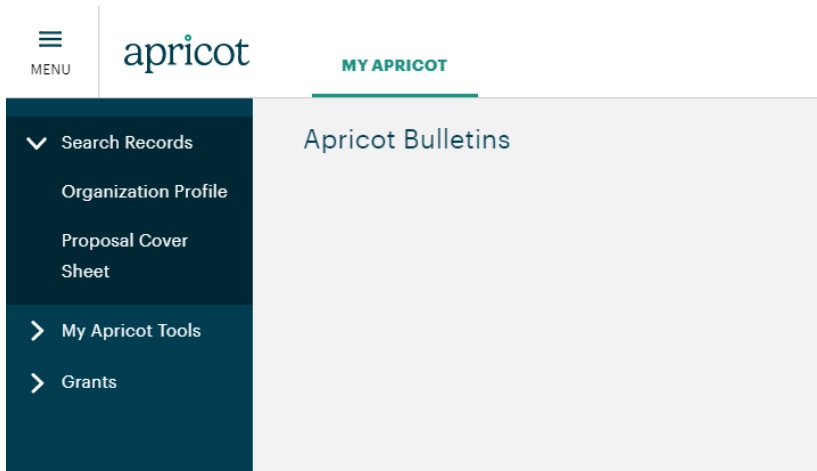
PLEASE NOTE

If your organization does not currently have an Apricot account, please contact the administrator of the RFP to which you are responding. Only one login is granted per organization and logins are valid for all sources of funding (Boone County, City of Columbia, and the Heart of Missouri United Way.)

- Once you are logged in, you will be navigated to your **MY APRICOT** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information are also posted on this page.



- You can navigate to your Organization Profile and Proposal Cover Sheet by selecting the arrow beside "Search Records."



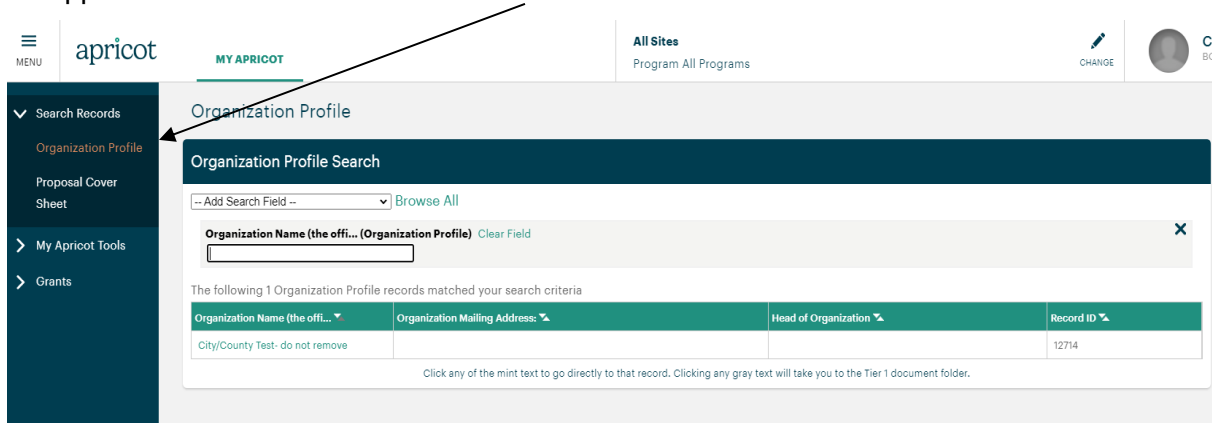
Section 2: Developing and Submitting Proposals

This section provides step-by-step instructions to develop and submit proposals.

Step 1: Update Organization Profile

You will first need to update your **Organization Profile**.

- To access the **Organization Profile**, click on **Organization Profile** in the navigation menu in the upper left-hand corner under **Search Records**.



- This will navigate you to the **Organization Profile Search** page in which your organization name is listed. Click on your organization's name.

Organization Profile

Organization Profile Search

-- Add Search Field -- [Browse All](#)

Organization Name (the offi... (Organization Profile) [Clear Field](#)

The following 1 Organization Profile records matched your search criteria

| Organization Name (the offi... ▼ | Organization Mailing Address: ▼ | Head of Organization ▼ | Record ID ▼ |
|----------------------------------|---------------------------------|------------------------|-------------|
| City/County Test- do not remove | | | 12714 |

Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.

- This will navigate you to your **Organization Profile**.

Organization Profile

Organization Profile Instructions ▼

New Users:


In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

Returning Users:

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.


Organization User Information ▼

Primary Information ▼

*Organization Name (the official name of the organization that would enter into a contract): 

City/County Test- do not remove

DBA:

Federal EIN Number: 

*Organization Type:

Governmental ▼

- Update all applicable information in the **Organization Profile**, including uploaded documents.

Organization Profile

Organization Profile Instructions ▼

New Users:


In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.


Returning Users:


You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.


COLLAPSE ALL

Record Options ▼

 Save Record


 Print Mode

 View History

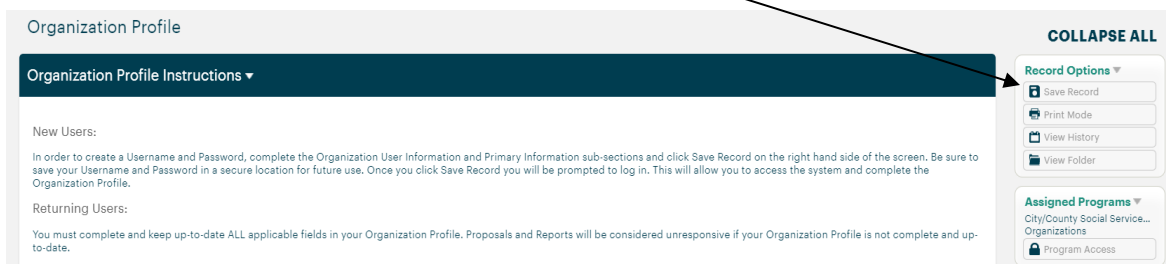
 View Folder

Assigned Programs ▼

City/County Social Service... Organizations

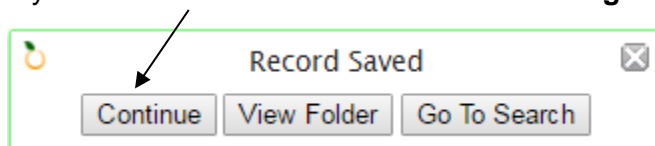
 Program Access

5. To save the information you have entered in your **Organization Profile**, click **Save Record** under **Record Options** as you work on completing these fields and when it is complete.

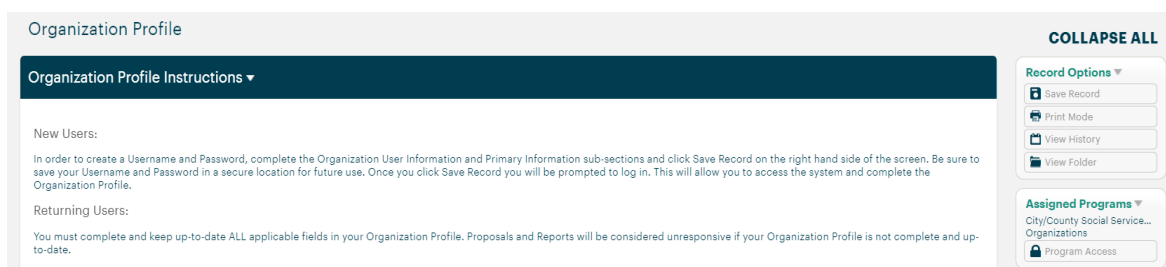


After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

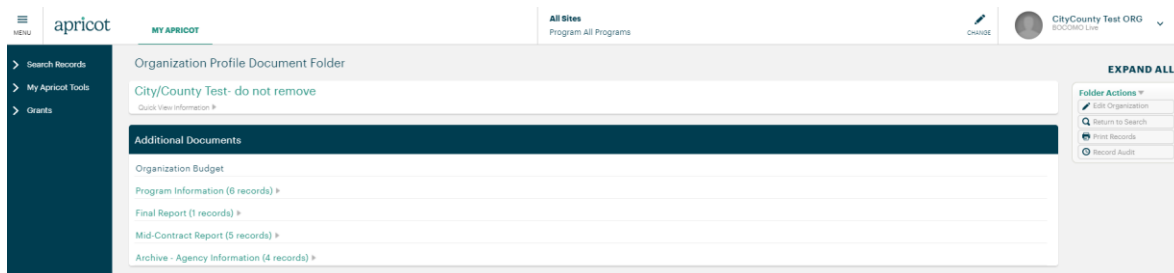
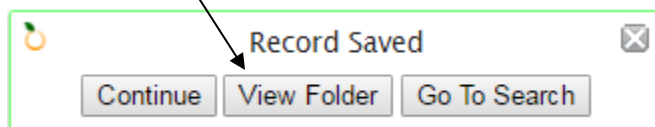
- ❖ If you would like to continue to work on the **Organization Profile**, click on **Continue**.



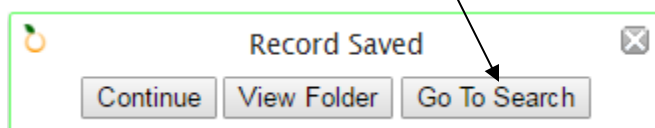
The **Organization Profile** will remain open.



- ❖ If **View Folder** is clicked, you will be navigated to the **Organization Profile Document Folder**.



- ❖ If you click **Go To Search**, you will be navigated back to the **Organization Profile Search** that where a link to your **Organization Profile** will be listed.



Organization Profile

Organization Profile Search

-- Add Search Field -- [Browse All](#)

Organization Name (the offi... (Organization Profile) [Clear Field](#) X

The following 1 Organization Profile records matched your search criteria

| Organization Name (the offi... ▼ | Organization Mailing Address: ▼ | Head of Organization ▼ | Record ID ▼ |
|----------------------------------|---------------------------------|------------------------|-------------|
| City/County Test- do not remove | | | 12714 |

Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.

PLEASE NOTE

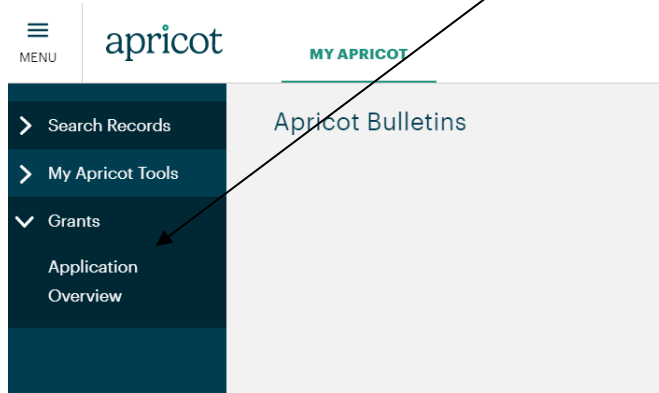
The **Organization Profile** must be complete and up to date when submitting a proposal. Proposals will be considered unresponsive if any applicable fields are incomplete.

There are some fields that are not required form fields but must be completed. Please do not utilize the green check marks, in the **Record Save Checklist** as a guide for completeness.

Step 2: Create Proposal Cover Sheet

The next step is to create a **Proposal Cover Sheet**.

1. In the blue navigation menu on the left side of the screen, click **Grants** and then **Application Overview**.



2. This will navigate you to the **Application Overview** page, which will list any **Available** (open) RFPs and RFPs for which you have submitted proposals.

Application Overview COLLAPSE ALL

Current Profile
City/County Test- do not remove

Application Summary
• 6 Grants (25 inaccessible, 31 total)
• 6 Applications [Show Access Details](#)

Children's Services Fund - Identified Youth Needs ▼

Description This RFP will open on 7/13/2021
Enrollment End Date 08/23/2021 12:00 PM CDT
Status Open - [Click Here to Apply](#)

Proposal Cover Sheet Applications

| Access | Organization Name (will auto-populate) | Fund Source | Funder | Funding Cycle | Name of Program or Project | Record Lock |
|--------|--|---|--------------|-----------------|----------------------------|-------------|
| View | City/County Test- do not remove | Children's Services Fund - Identified Youth Needs | Boone County | RFP 29-234/J021 | Enter Name Here | sf |

- Click **Open – Click Here to Apply** for the applicable RFP to open a new **Proposal Cover Sheet**.

Children's Services Fund - Identified Youth Needs ▼

| | |
|---------------------|----------------------------------|
| Description | This RFP will open on 7/13/2021. |
| Enrollment End Date | 08/23/2021 12:00 PM CDT |
| Status | Open - Click Here to Apply |

Proposal Cover Sheet Applications

No applications have been created for this grant.

- Under the **Proposal Request Information** section complete the **Fund Source** (make sure that this matches the RFP for which you are applying, as selected on the **Application Overview** page), **Name of Program or Program**, and the **Amount of the Request**. The **Organization Name**, **Funder**, and **Funding Cycle** will all auto-populate.

apricot

MY APRICOT

All Sites
Program All Programs

CHANGE

CityCounty Test ORG
BOCJOMO Live

Search Records

My Apricot Tools

Grants

Proposal Cover Sheet

Proposal Request Information ▼

Orant
City of Columbia- RFP FY2022 Social Services (Proposal in Progress)

*Organization Name (will auto-populate)

City/County Test- do not remove

Fund Source
Social Services FY2022

Funder
City of Columbia

*Funding Cycle

FY2022

*Name of Program or Project

FY2022 test 1

*City Social Services - Issue Area

Basic Needs

*City Social Services - Program Service Period

☒ Year Round
☐ School Year
☐ Summer

Record Options ▼

Save Record

Print Mode

View History

View Folder

Assigned Programs ▼

Organizations

Program Access

Record Save Checklist ▼

Required Field Checks

*Program Administrator Name Field Validation Checks

Form Logic Rules ▼

Clicker Access to Service Section

Last Saved ▼

07/15/2021 2:54 PM CDT

Steve Hollis ADMIN

PLEASE NOTE

Be sure the fund source you select matches the RFP for which you are applying, as selected on the **Application Overview** page.

- Scroll down and complete all the fields in the **Program Information** section.

Program Information ▼

Program Website (will default to Organization website)

http://www.google.com

Program Address (will default to Organization Physical Address)

Address

Line 1

Line 2

City

City

State

--Please Select--

County

County

Zip

Program Mailing Address (will default to Organization Mailing Address)

Address

Line 1

Line 2

City

City

State

--Please Select--

County

County

Zip

7

Updated: July 12, 2022

- Some RFPs require additional **Attachments** or **Addendums** which must be uploaded in the fields provided in the include **Required Attachments** section. As applicable, these fields must be completed before submitting the proposal.

Required Attachments - Children's Services Fund and Community Health Only ▼

Attachment A 2021 Organization Assurance Sheet
 No file chosen
 Up to 25 MB

Attachment B Certification Regarding Debarment, Suspension, Ineligibility, and Volunteer Exclusion
 No file chosen
 Up to 25 MB

Attachment C Work Authorization Certification
 No file chosen
 Up to 25 MB

Signed Addendums
 No file chosen
 Up to 25 MB

- To save the information you have entered in the **Proposal Cover Sheet**, click **Save Record** under **Record Options**.

Proposal Cover Sheet

Proposal Request Information ▼

Grant
 Children's Services Fund - Identified Youth Needs (Application in Progress)

***Organization Name (will auto-populate)**

City/County Test- do not remove

Record Options ▼

Assigned Programs ▼
 (New) Organizations

COLLAPSE ALL

After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If you would like to continue to work on the **Cover Sheet**, click on **Continue**.

Record Saved

The **Proposal Cover Sheet** will remain open.

apricot MY APRICOT All Sites Program All Programs

Search Records My Apricot Tools Grants

Proposal Cover Sheet

Proposal Request Information ▼

Grant
 City of Columbia- RFP FY2022 Social Services (Proposal in Progress)

***Organization Name (will auto-populate)**

City/County Test- do not remove

Fund Source
 Social Services FY2022

Funder

City of Columbia

***Funding Cycle**

FY2022

***Name of Program or Project**

FY2022 test 1

***City Social Services- Issue Area**
 Basic Needs

***City Social Services- Program Service Period**
☒ Year Round
☐ School Year
☐ Summer

Record Options ▼

Assigned Programs ▼
 Organizations

Record Save Checklist ▼
 Required Field Checks
 *Program Administrator Name Field Validation Checks

Form Logic Rules ▼
 Show Rules by Service Section

Last Saved ▼
 07/12/2022 2:34 PM EDT
 Steve Hally Admin

COLLAPSE ALL

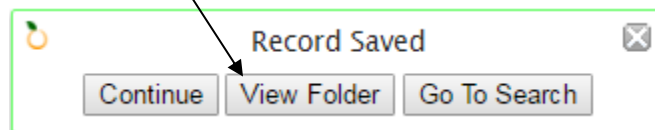
- ❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.

Record Saved

For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has two **Proposal Cover Sheets**. Any one of these may be clicked to access the applicable cover sheet.

| Proposal Cover Sheet Search | | | | | |
|---|---------------------------------|------------------------|------------------|---------------|----------------------------|
| -- Add Search Field -- Browse All The following 6 Proposal Cover Sheet records are available More Columns... | | | | | |
| Grant | Organization Name (will aut... | Fund Source | Funder | Funding Cycle | Name of Program or Project |
| City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT) | City/County Test- do not remove | Social Services FY2018 | City of Columbia | FY2018 | Test 1 |
| City of Columbia- RFP FY2019 Social Services (Proposal in | City/County Test- do not | | City of | | |

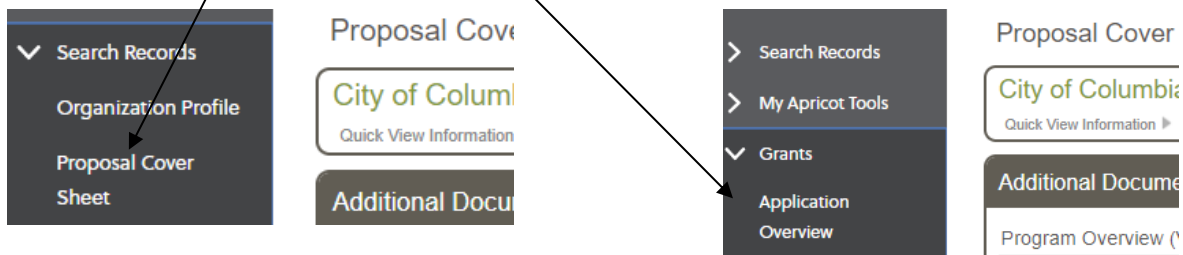
- ❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.



From the **Proposal Cover Sheet Document Folder**, you can begin completing the proposal forms, per Step 3.

The screenshot shows the "Proposal Cover Sheet Document Folder" interface. At the top, it says "City/County Test- do not remove" with a "Quick View Information" link. Below this is a section titled "Additional Documents" with two tables. The first table, "Program Overview - V4 (1 records)", has columns for "Total Revenue %", "L %", "Total Expenses %", and "Complete". The second table, "Program Outcomes and Services - V4 (1 records)", has columns for "Service #1 Name: %", "Unit Measure (M): %", "Unit Rate (R): %", and "Complete". Both tables show a single record with values like "0", "\$0.00", and "0". On the right side, there are "Folder Actions" and "Grant Actions" menus. The "Folder Actions" menu includes "Edit Proposal Cover", "Return to Search", "Application Overview", "Print Records", and "Record Audit". The "Grant Actions" menu includes "Submit Proposal", "Required Forms", and "Required Fields".

- You can navigate back to any **Proposal Cover Sheets** you have created by clicking on either the **Proposal Cover Sheet** or **Application Overview** the white navigation menu on the left side of the screen.



Clicking on these links will respectively direct you to the **Proposal Cover Sheet Search** page or the **Application Overview** page.

- ❖ To open the **Proposal Cover Sheet** from the **Proposal Cover Sheet Search** page, click on any of the form quick fields for the applicable cover sheet.

Proposal Cover Sheet Search

-- Add Search Field -- [Browse All](#)

The following 6 Proposal Cover Sheet records are available [More Columns...](#)

| Grant | Organization Name (will aut... | Fund Source | Funder | Funding Cycle | Name of Program or Project |
|--|---------------------------------|------------------------|------------------|---------------|----------------------------|
| City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT) | City/County Test- do not remove | Social Services FY2018 | City of Columbia | FY2018 | Test 1 |
| City of Columbia- RFP FY2019 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT) | City/County Test- do not remove | Social Services FY2019 | City of Columbia | FY2019 | Test 1 |

- ❖ To access the **Proposal Cover Sheet** from the **Application Overview** page, click on any of the form quick fields for the applicable cover sheet.

apricot MY APRICOT All Sites Program All Programs

Search Records My Apricot Tools Grants Application Overview

Application Overview [COLLAPSE ALL](#)

Current Profile
City/County Test- do not remove

Application Summary
• 7 Grants (34 inaccessible, 31 total)
• 7 Applications [Show Access Details](#)

Children's Services Fund - Identified Youth Needs

Description This RFP will open on 7/13/2021.
Enrollment End Date 08/23/2021 12:00 PM CDT
Status Open - [Click Here to Apply](#)

Proposal Cover Sheet Applications

| Access | Organization Name (will auto-populate) | Fund Source | Funder | Funding Cycle | Name of Program or Project | Record Lock |
|--------|--|---|--------------|----------------|----------------------------|-------------|
| View | City/County Test- do not remove | Children's Services Fund - Identified Youth Needs | Boone County | RFP 29-23AU021 | Enter Name Here | all |

This will navigate you to the **Proposal Cover Sheet Document Folder**. To open the **Proposal Cover Sheet**, click on **Edit Proposal Cover** in the navigation menu on the right-hand side of the screen under **Folder Actions**.

apricot MY APRICOT All Sites Program All Programs

Search Records My Apricot Tools Grants

Proposal Cover Sheet Document Folder

City/County Test- do not remove [Quick View Information](#)

Additional Documents

Program Overview - V4 (1 records)

| Total Revenue % | Total Expenses % | Actions |
|-----------------|------------------|----------|
| 0 | \$0.00 | Complete |

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records)

| Service #1 Name % | Unit Measure (M1) % | Unit Rate (M1) % | Actions |
|-------------------|---------------------|------------------|----------|
| | | \$0.00 | Complete |

Page 1 of 1 | 20 records per page

Folder Actions

- [Edit Proposal Cover](#)
- [Return to Search](#)
- [Application Overview](#)
- [Print Records](#)
- [Record Audit](#)

Grant Actions

- [Submit Proposal](#)
- [Required Forms](#)
- [Required Fields](#)

Step 3: Create Proposal Forms

PLEASE NOTE

While not a requirement, it is highly recommended that you complete all the fields in the **Organization Profile** and the **Proposal Cover Sheet** before creating proposal forms as information from these forms is auto-populated in the proposal forms. The **Name of the Program or Project** and the **Amount Requested** can be changed or saved at any time in the **Proposal Cover Sheet**.

1. Once you have completed the **Proposal Cover Sheet**, you can create the proposal forms.

For each proposal, you will need to create the following forms:

- ❖ One **Program Overview** form
- ❖ One **Program Personnel and Budget** form
- ❖ One **Program Outcomes and Services** form

2. To locate the proposal forms, navigate to the **Proposal Cover Sheet Document Folder**, per Section 2.2.8. The **Proposal Cover Sheet Document Folder** contains all the forms for each proposal, under **Additional Documents**.

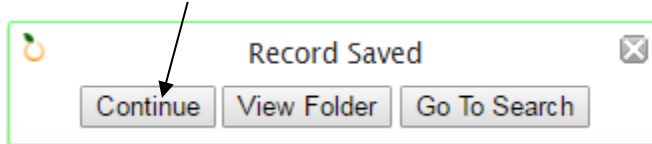
3. To create a proposal form, click on the **Actions** link arrow on the right-hand side of the box. When you hover over the word **Actions**, **Create New** will appear. Click on **Create New** to create a new proposal form.

4. To save a proposal form you have created and/or the information you have entered in a proposal form, click on **Save Record**, in the **Record Options** menu.

After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If **View Folder** is clicked, you will be navigated back to the **Proposal Cover Sheet Document Folder** where the proposal forms are located (under **Additional Documents**).

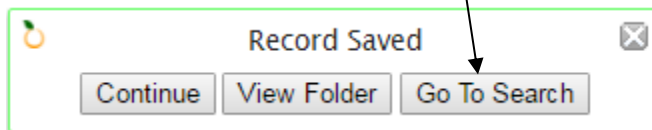
If you would like to continue to work on the proposal form, click on **Continue**.



The proposal form will remain open.

A screenshot of the 'Program Overview - V4' form. The main content area shows 'City/County Test- do not remove' and a 'Quick View Information' link. Below this is a 'Program Proposal Form Information' section with a dropdown arrow and some text. The right sidebar contains several sections: 'Record Options' with 'Save Record' and 'View Folder' buttons; 'Assigned Programs' with '(New) Organizations' and 'Program Access' links; and a 'Record Save Checklist' section. A 'COLLAPSE ALL' button is at the top right of the sidebar.

- ❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.

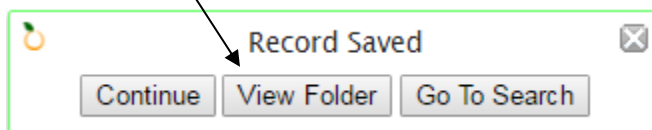


For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has two **Cover Sheets**. Click any of the form quick view fields to access the applicable cover sheet.

A screenshot of the 'Proposal Cover Sheet Search' table. It has a dark blue header and a search bar at the top. Below the search bar, it says 'The following 6 Proposal Cover Sheet records are available'. The table has 6 columns: Grant, Organization Name (will aut...), Fund Source, Funder, Funding Cycle, and Name of Program or Project. There are two rows of data visible.

| Grant | Organization Name (will aut...) | Fund Source | Funder | Funding Cycle | Name of Program or Project |
|--|---------------------------------|------------------------|------------------|---------------|----------------------------|
| City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT) | City/County Test- do not remove | Social Services FY2018 | City of Columbia | FY2018 | Test 1 |
| City of Columbia- RFP FY2019 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT) | City/County Test- do not remove | Social Services FY2019 | City of Columbia | FY2019 | Test 1 |

- ❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.



- Once created, proposal forms can be accessed in the **Proposal Cover Sheet Document Folder** under **Additional Documents**. To open and edit proposal forms at any time prior to submitting the proposal, click on any of the form quick view fields.

PLEASE NOTE

- ❖ If you inadvertently create more than one of each proposal form, please contact the applicable funder.
- ❖ For each additional proposal to be submitted in response to a RFP, you will need to re-start the process at **Step 2: Create Proposal Cover Sheet**.

Step 4: Complete Proposal Forms

As you complete the proposal forms, please note the following:

- ❖ Be sure to thoroughly read the instructions for each form and section.
- ❖ The time period of the proposed year is indicated in each RFP.
- ❖ The total amount proposed should be the same in the Program Personnel and Budget form, Program Outcomes and Services form, and Proposal Cover Sheet.
- ❖ Remember to save frequently so information is not lost.

Program Overview Form

As you complete the Program Overview form, please note the following regarding Program Consumers information:

- ❖ The total number of unduplicated individuals to be served is for the entire proposed program.
- ❖ Program Consumer Demographics
 - The totals in each sub-section should match one another and should match the total number of unduplicated individuals to be served.
 - Consumer Demographics by Residence

- The number of Boone County residents to be served should include all City of Columbia residents to be served (all City of Columbia residents are also resident of Boone County).
- The Residence Total is a calculation which totals the county counts.

| Residence ▼ | |
|--|--------------------------------|
| Boone County (includes City of Columbia residents) | City of Columbia |
| <input type="text" value="0"/> | <input type="text" value="0"/> |
| Cooper County | |
| <input type="text" value="0"/> | |
| Howard County | |
| <input type="text" value="0"/> | |
| Other Counties | |
| <input type="text" value="0"/> | |
| Residence Total | |
| <input type="text" value="0"/> | |

Program Personnel and Budget Form

As you complete the Program Personnel and Budget form, please note the following:

- ❖ The Proposed period is indicated in each RFP.
- ❖ Amounts should be for entire program.
- ❖ Be sure to include a narrative for each item.
- ❖ Be sure to include the total proposed amount in the applicable revenue source. This amount should match the total amount proposed indicated in the Program Outcomes and Services form.

Program Outcomes and Services Form

As you complete the Program Outcomes and Services form, please note the following:

Program Outcomes and Performance Measures

- ❖ Complete the logic model for the entire program.
- ❖ Outcomes must be selected from the Boone Impact Group Common Outcomes included with each RFP.
- ❖ Up to three Indicators can be included for each Outcome.
 - Only one data point should be included in each Indicator %, Indicator, and Method of Measurement field.
 - Only list a number in the Indicator % fields. Do NOT include the % symbol in these fields.
- ❖ All program services indicated in the Program Services section should be indicated as contributing to at least one Outcome.
 - Program services should be included regardless of whether or not they are being proposed for funding.
- ❖ All program services which contribute to an Outcome should be listed in the Contributing Services.
 - This may mean services are indicated across multiple outcomes.

Program Services

- ❖ Program services must be selected from the Boone Impact Group Taxonomy of Services included with each RFP.
- ❖ Enter program services for which funding is requested first.
- ❖ You only need to enter detailed information for services for which funding is requested.
- ❖ As applicable by funder, the program services should match the program services approved in the Letter of Intent.

Step 5: Review Proposal

Before submitting a proposal, it is critical that you review the **Organization Profile, Proposal Cover Sheet, and Proposal forms** to ensure all forms were created and all fields are completed.

1. Review the **Organization Profile** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required form fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

The screenshot shows the Apricot system interface. The left navigation menu includes 'Search Records', 'My Apricot Tools', and 'Grants'. The main content area is titled 'Organization Profile' and contains sections for 'Organization User Information' and 'Primary Information'. The 'Primary Information' section has fields for 'Organization Name', 'DBA', 'Federal EIN Number', and 'Organization Type'. The 'Record Save Checklist' on the right side of the screen shows 'Required Field Checks' with a red 'X' icon, indicating incomplete fields. An arrow points from the text above to the 'Required Field Checks' section.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

The screenshot shows the Apricot system interface with the 'Organization Profile' form. The 'Record Save Checklist' on the right side of the screen shows 'Required Field Checks' with a green checkmark icon, indicating that all required fields are completed. An arrow points from the text above to the 'Required Field Checks' section.

However, most of the fields in the **Organization Profile** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Organization Profile**.

2. Review the **Proposal Cover Sheet** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

The screenshot shows the 'Proposal Cover Sheet' form in the Apricot system. The 'Record Save Checklist' on the right side of the form indicates that 'Required Field Checks' are incomplete, marked with a red X. An arrow points from the explanatory text above to this red X.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

The screenshot shows the 'Proposal Cover Sheet' form in the Apricot system. The 'Record Save Checklist' on the right side of the form indicates that 'Required Field Checks' are complete, marked with a green checkmark. An arrow points from the explanatory text above to this green checkmark.

However, most of the fields in the **Proposal Cover Sheet** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Cover Sheet**.

3. Review the **Proposal Cover Sheet Document Folder** to be sure all required proposal forms were created.

The presence of the required proposal forms is indicated in the white navigation menu on the right side of the screen under **Grant Actions**.

If an “X” is displayed, one or more of the required proposal forms is missing.

The screenshot shows the 'Proposal Cover Sheet Document Folder' view in the Apricot system. The 'Grant Actions' menu on the right side of the screen indicates that 'Required Forms' are missing, marked with a red X. An arrow points from the explanatory text above to this red X.

If a “✓” is displayed, the required proposal forms are present.

4. Review the **Proposal Forms** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

However, most of the fields in the **Proposal Forms** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Forms**.

Step 6: Submit Proposal

Once you have reviewed the proposal, you will need to submit it.

1. Return to the **Proposal Cover Sheet Document Folder**.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information ▶

Additional Documents

Program Overview - V4 (1 records) ▶ Actions ▶

| Total Revenue ▼ | 1. ▼ | Total Expenses ▼ | Complete |
|-----------------|-------------|------------------|----------|
| 15000 | \$15,000.00 | 15000 | |

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▶ Actions ▶

| Service #1 Name: ▼ | Unit Measure (#1): ▼ | Unit Rate (#1): ▼ | Complete |
|--------------------|----------------------|-------------------|----------|
| abc | abc | \$10.00 | |

Page 1 of 1 | 20 records per page

Folder Actions ▼

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

Grant Actions ▼

- Submit Application
- Required Forms ✓
- Required Fields ✓

COLLAPSE ALL

2. To submit the proposal, click **Submit Proposal** under the **Grant Actions**.

apricot

MY APRICOT

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information ▶

Additional Documents

Program Overview - V4 (1 records) ▶ Actions ▶

| Total Revenue ▼ | 1. ▼ | Total Expenses ▼ | Complete |
|-----------------|--------|------------------|----------|
| 1 | \$1.00 | 2 | |

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▶ Actions ▶

| Service #1 Name: ▼ | Unit Measure (#1): ▼ | Unit Rate (#1): ▼ | Complete |
|--------------------|----------------------|-------------------|----------|
| 1 | | \$0.00 | |

Page 1 of 1 | 20 records per page

Folder Actions ▼

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

Grant Actions ▼

- Submit Proposal
- Required Forms ✓
- Required Fields ✓

COLLAPSE ALL

PLEASE NOTE

- ❖ Once submitted, the proposal forms are locked and can no longer be edited. If you inadvertently submit a proposal prior to the submission deadline, contact the applicable funder to re-open the proposal forms.
- ❖ You must submit each proposal individually following the actions outlined in **Step 5**:

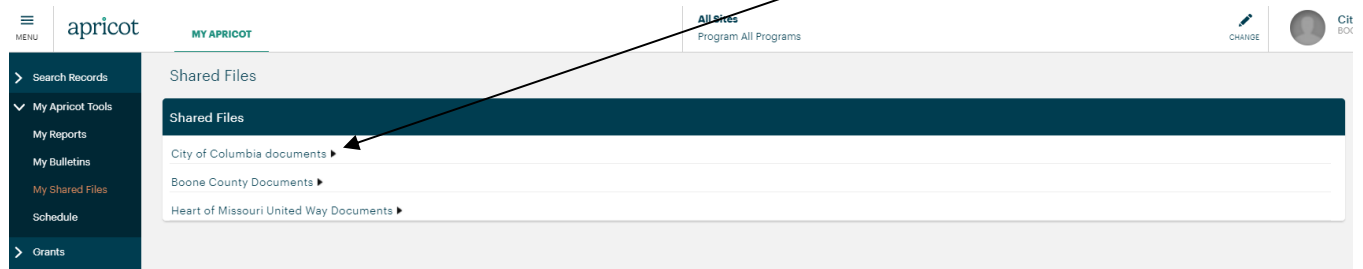
Section 3: Helpful Tips

❖ My Shared Files

Supporting RFP documents are located in the My Shared Files page. To access these documents, click **My Shared Files** in the navigation menu on the left-side of the screen.

- > Search Records
- ✓ My Apricot Tools
- My Reports
- My Bulletins
- My Shared Files
- Schedule
- > Grants

This will navigate you to the **My Shared Files** page. Click on the triangle next to the funder to access the documents.



❖ Symbols

The following are symbols utilized in the *Apricot* funding management system.

| | |
|---|---|
| * | Required Field |
| ▼ | Open or close viewing of forms. |
| ? | Tool Tip: If the cursor hovers over this it will information about that specific request or requirement. |
| ✓ | Indicates required system fields have been completed. (Please Note: A green check mark does not necessarily indicate that a form is complete.) |
| ✗ | Indicates that the required system fields are incomplete. |
| ⋮ | Enables users to see section values in the Additional Documents section. |
| 🔒 | Indicates that the field will be auto-populated. The user doesn't have the ability to enter any information. |

❖ Printing Records

Forms can be printed using the **Print Mode** feature located in the **Record Options** menu on the right side of the screen.

